

Finance Sample List of Existing Credentials
(Includes education and industry certificates, and postsecondary degree options)
Updated: September 19, 2011

NCTEF/NASDCTEc does not endorse any of the listed licenses, certificates or degrees.

Education and Industry <i>Licenses</i>		
Title/Type/Descriptor of Licensing Program	Licensing Organizations	Source for Contact Information
Bill & Account Clerks	(Varies from State to State)	http://www.careerinfonet.org/ Click Career Tools and search under <i>Career tools: Licensing Occupations</i> by specific Finance occupations, by state or by agency
Claims Examiners, Property & Casualty Insurance		
Credit Checkers		
Financial Analysts, Statistical		
Financial Managers		
Insurance Adjusters, Examiners & Investigators		
Insurance Appraisers, Auto Damage		
Loan Officers & Counselors		
Loan & Credit Clerks		
All Other Financial Specialists		
Sales Agents, Securities & Commodities & Financial Services		
Special Agents, Insurance		
Tax Examiners & Revenue Agents		
Tax Preparers		
Title Examiner & Abstractors		
Education and Industry <i>Certificates</i>		
Title/Type/Descriptor of Certification Program	Issuing Organization	Source for Contact Information
Academy of Finance Certificate	National Academy Foundation	http://naf.org/
Accredited Advisors in Insurance	Insurance Institute of America	http://www.aicpcu.org/flyers/aai.htm
Accredited Business Accountant/Advisor	Accreditation Council for Accountancy & Taxation	www.acatcredentials.org/credentials/ABA.htm

Accredited Financial Counselor	Association for Financial Counseling and Planning Education	www.afcpe.org/certification
Accredited Financial Examiner	Society of Financial Examiners	http://www.sofe.org/designations
Accredited Insurance Examiner	Insurance Regulatory Examiners Society	www.go-ires.org/accreditation/index.cfm
Certified Residential Underwriter	Mortgage Bankers Association of America	http://www.campusmba.org/
Certified Residential Loan Officer		
Certified Commercial/Residential Mortgage Servicer		
Accredited Residential Manager	Institute of Real Estate Management	http://www.irem.org/
Accredited Tax Advisor	Accreditation Council for Accountancy & Taxation	www.acatcredentials.org/credentials/ATA.htm
Accredited Tax Preparer Accredited Retirement Advisor		www.acatcredentials.org/credentials/ATP.htm
A*S*K Concepts of Finance Certification	Institute for the Assessment of Skills and Knowledge of Business	http://www.askinstitute.org/
A*S*K Concepts of Entrepreneurship and Management Certification		
A*S*K Fundamental Business Concepts Certification		
A*S*K Fundamental Marketing Concepts Certification		
Associate in Chartered Property Casualty Underwriter	Insurance Institute of America	http://aicpcu.org/programs/index.htm
Associate in Claims		http://aicpcu.org/flyers/aic.htm
Associate in Fidelity and Surety Bonding		http://aicpcu.org/flyers/afsb.htm
Associate in Insurance Accounting & Finance	LOMA	www.loma.org/AIAF.asp
Associate in Insurance Accounting and Finance	Insurance Institute of America	http://aicpcu.org/flyers/aiaf.htm
Associate in Insurance Services		http://aicpcu.org/flyers/ais.htm
Associate in Management		http://aicpcu.org/flyers/aim.htm
Associate in Marine Insurance Management		http://www.aicpcu.org/flyers/amim.htm

Associate in Personal Insurance Program		http://aicpcu.org/flyers/api.htm
Associate in Premium Auditing		http://aicpcu.org/flyers/apa.htm
Associate in Regulation & Compliance		http://aicpcu.org/flyers/arc.htm
Associate in Reinsurance		http://aicpcu.org/flyers/are.htm
Associate in InfoTech		http://aicpcu.org/flyers/ait.htm
Associate in Risk Management		http://aicpcu.org/comet/programs/arm/arm.htm
Associate In Risk Management for Public Entities		http://aicpcu.org/comet/programs/arm/arm.htm
Associate in Surplus Lines Insurance		http://aicpcu.org/flyers/asli.htm
Associate in the Casualty of Actuarial Society	Casualty Actuarial Society	www.casact.org
Associate in Commercial Underwriting	Insurance Institute of America	http://aicpcu.org/flyers/au.htm
Associate Insurance Data Manager	Insurance Data Management Association	www.idma.org
Associate of the Society of Actuaries	Society of Actuaries	www.soa.org
Associate Professional Member	American Society of Pension Actuaries	http://www.asppa.org/Main-Menu/Knowledge/CertandCred/Credential%20Programs/APM.aspx
Associate, Annuity Products & Administration	LOMA	www.loma.org/AAPA.asp
Associate, Customer Service Program		www.loma.org/ACS.asp
Associate, Insurance Regulatory Compliance		www.loma.org/AIRC.asp
Associate, Life and Health Claims	International Claim Associate	www.claim.org
Associate, Reinsurance Administration	LOMA	www.loma.org/ARA.asp
Automated Examination Specialist	Society of Financial Examiners	http://www.sofe.org/designations
Board Certified in Estate Planning	Institute of Certified Fund Specialists	www.icfs.com
Certified Annuity Specialist		www.icfs.com
Certified Income Specialist		www.icfs.com
Certified Tax Specialist		www.icfs.com
Certified Bookkeeper Professional	American Institute of Professional Bookkeepers	http://www.aipb.org/

Certification in Control Self-Assessment	Institute of Internal Auditors	www.theiia.org
Certified Bank Auditor	Bank Administration Institute	http://www.bai.org/
Certified Compliance Specialist	Credit Union National Association, Inc.	http://www.cuna.org/
Certified Corporate Trust Specialist	American Bankers Association	www.aba.com/ICB/CCTS.htm
Certified Customer Service Representative		www.aba.com/ICB/CCSR.htm
Certified Financial Market Professional		www.aba.com/ICB/CFMP.htm
Certified Personal Banker		www.aba.com/ICB/CPB.htm
Certified Bank Teller		www.aba.com/ICB/CBT.htm
Certified Cost Estimator/Analyst	Society of Cost Estimating & Analysis	www.sceaonline.org
Certified Credit Union Executive	Credit Union National Association, Inc.	http://www.cuna.org/
Certified Financial Examiner	Society of Financial Examiners	http://www.sofe.org/designations
Certified Financial Management Specialist	Credit Union National Association, Inc.	http://www.cuna.org/
Certified Financial Planner	Certified Financial Planner Board of Standards, Inc.	www.CFP.net
Certified Financial Risk Manager	Global Association of Risk Professionals	www.garp.com
Certified Credit Executive	National Association of Credit Management	www.nacm.org
Loan Review Certification	Bank Administration Institute	www.bai.org
Certified Financial Services Professional	Credit Union National Association, Inc.	http://www.cuna.org/
Certified Financial Services Security Professional	American Bankers Association	http://www.aba.com/ICB/CFSSP.htm
Certified Fraud Auditor	International Fraud Training Institute	
Certified Fraud Consultant		
Certified Fraud Examiner	Association of Certified Fraud Examiners	www.cfenet.org
Certified Fraud Investigator	International Fraud Training Institute	
Certified Fund Specialist	Institute of Certified Fund Specialists	www.icfs.com
Certified in Financial Management	Institute of Management Accountants	www.imanet.org
Certified Government Financial Manager	Association of Government Accountants	http://www.agacgfm.org/homepage.aspx
Certified Insurance Examiner	Insurance Regulatory Examiners Society	www.go-ires.org

Certified Internal Auditor	Institute of Internal Auditors	www.theiia.org
Certified Investment Management Analyst	Investment Management Consultants Association	http://www.imca.org/
Certified Private Wealth Advisor		
Certified IRA Services Professional	American Bankers Association	http://www.aba.com/ICB/CISP.html
Certified Lender Business-Banker		http://www.aba.com/ICB/CLBB.htm
Certified Lending Specialist	Credit Union National Association, Inc.	http://www.cuna.org/
Certified Management Accountant	Institute of Management Accountants	www.imanet.org
Certified Market Analyst/Financial Analyst Designate	American Academy of Financial Management	http://www.financialcertified.com/
Certified in Corporate Finance/Master Financial Manager		
Certified Mortgage Banker	Mortgage Bankers Association of America	http://www.campusmba.org/certificatesanddesignations
Certified Public Accountant	American Institute of Certified Public Accountants	http://aicpa.org/
Certified Real Estate Brokerage Manager	Council of Real Estate Brokerage Managers	http://www.crb.com/
Certified Regulatory Compliance Manager	American Bankers Association	http://www.aba.com/ICB/CRCM.htm
Certified Residential Specialist	Council of Residential Specialists	http://www.crs.com/
Certified Retirement Services Professional	American Bankers Association	http://www.aba.com/ICB/CRSP.htm
Certified Risk Manager	Certified Risk Managers International	www.scic.com/
Certified Insurance Counselor	Certified Risk Managers International	www.scic.com/
Certified Insurance Service Representative		
Certified Risk Professional	Bank Administration Institute	http://www.bai.org/
Certified Securities Operations Professional	American Bankers Association	http://www.aba.com/ICB/CSOP.htm
Certified Securities Processing Master	Securities Operations Forum	www.soforum.com
Certified Securities Processing Specialist		
Certified Trust and Financial Advisor	American Bankers Association	http://www.aba.com/ICB/CTFA.htm

Chartered Financial Analyst	Association of Investment Management & Research Chartered Financial Analyst Institute	www.aimr.com http://www.cfainstitute.org/
Chartered Financial Consultant	Society of Financial Services	http://www.theamericancollege.edu/subpage.php?pageId=254
Chartered Life Underwriter	Professional	http://www.theamericancollege.edu/subpage.php?pageId=256
Chartered Property Casualty Underwriter	American Institute of Chartered Property Casualty Underwriters	www.aicpcu.org/comet/programs/cpcu/cpcu.htm
Credit Business Associate	National Association of Credit Management	www.nacm.org
Credit Business Fellow		
Fellow in the Casualty Actuarial Society	Casualty Actuarial Society	www.casact.org
Fellow of the Society of Actuaries	Society of Actuaries	www.soa.org
Fellow, Life and Health Claims	International Claim Associate	www.claim.org
Fellow, Society of Pension Actuaries	American Society of Pension Actuaries	http://www.aspa.org/FSPA
General Securities Registered Representative (Series 7)	Financial Industry Regulatory Authority (FINRA)	http://www.finra.org/
Investment Company Products/Variable Contracts Limited Representative (Series 6)		
Health Insurance Associate	Health Insurance Association of America	www.ahip.org
Managed Healthcare Professional		
Master Credit Executive	Association of Credit and Collection Professionals	http://www.acainternational.org/about.aspx?cid=825
Hong Kong Credit and Collection Professionals Certificate		http://www.acainternational.org/education-certificate-programs-13123.aspx
Professional Collection Specialist Certificate		
Creditor Collection Specialist Certificate		
Healthcare Collection Specialist Certificate		
Internet Computing Core Certification	Certiport	www.certipoint.com/yourpersonalpath/ic3certification
Member of American Academy of Actuaries	American Academy of Actuaries	www.actuary.org

Member, Society of Pension Actuaries	American Society of Pension Actuaries	http://www.asppa.org/Main-Menu/Knowledge/CertandCred/Credential%20Programs/MSPA.aspx
Microsoft Office Specialist - Word, Exel, Access,	Microsoft	http://www.microsoft.com/learning/en/us/default.aspx
Pre-Professional Certification in Personal and Family Finance	American Association of Family and Consumer Sciences (AAFCS)	http://www.aafcs.org/prepac
Tax Exempt and Government Plan Consultant	American Society of Pension Actuaries	http://www.asppa.org/Main-Menu/Knowledge/CertandCred/Credential%20Programs/TGPC.aspx
Qualified Plan Financial Consultant		http://www.aspa.org/Main-Menu/Knowledge/CertandCred/Credential%20Programs/QPFC_1.aspx
Personal Financial Specialist	American Institute of Certified Public Accountants	http://pfp.aicpa.org/
Qualified 401K Administrator	American Society of Pension Actuaries	http://www.asppa.org/Main-Menu/Knowledge/CertandCred/Credential%20Programs/QKA.aspx
Qualified Pension Administrator		http://www.asppa.org/Main-Menu/Knowledge/CertandCred/Credential%20Programs/QPA.aspx
Registered Employee Benefits Consultant	The American College	http://www.theamericancollege.edu/subpage.php?pageId=257
Registered Financial Planner Designation	Registered Financial Planners Institute	www.rfpi.com
Registered Health Underwriter	The American College	http://www.theamericancollege.edu/subpage.php?pageId=258
Registered Professional Liability Underwriter	Professional Liability Underwriting Society	http://www.plusweb.org/index.cfm/p/Edu.RPLU
Certified Financial Planner	The American College	http://www.theamericancollege.edu/subpage.php?pageId=253
Chartered Advisor for Senior Living		http://www.theamericancollege.edu/subpage.php?pageId=252
Chartered Advisor in Philanthropy		http://www.theamericancollege.edu/subpage.php?pageId=251
Certified Public Finance Administrator	Association of Public Treasurers of the US & Canada	www.aptusc.org
Certified Public Funds Investment Manager		

Model Investment Policy Certification		
Debt Policy Certification		
Disaster Preparedness Certification		
Cash Handling Certification		
W!SE Financial Literacy Certification	W!SE: Working in Support of Education	http://www.wise-ny.org/programs.htm

Postsecondary Degree Options

Title/Type/Descriptor of Degree Program	Degree Conferring Organization	Source for Contact Information
Accounting	Colleges & Universities	http://www.careerinfonet.org/ Click Career Tools and search under the topic <i>Education & Training Finder</i>
Accounting technician		
Actuarial Science		
Banking & Financial Support Services		
Finance, General		
Insurance & Risk Management		
Economics		